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PMO Scorecard

Assess Your Current PMO Practices and Build a Roadmap for Success

Your Journey Starts Here.

Understand Your PMO Strengths & Weaknesses

Evaluate Performance and Required Next Steps by PMO Area

Build a PMO Improvement Roadmap

The following report is a sample of what you will receive after completing the PMO Scorecard. Each report is customized to the individual organization highlighting the PMO's most pressing needs.

Complete the diagnostic program to get the data you need to start your PMO management journey.

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PMO Scorecard Copy: Inside the Report

1	**Understand Your PMO Strengths & Weaknesses**	Once a year, take a step back from day-to-day PMO operations and look at the big picture.	Measure your PMO practices against industry standard best practices	Build your framework for managing & improving PMO practices over the long term.
2	**Evaluate Performance and Required Next Steps by PMO Area**	Identify areas for improvement, and justify allocation of resources toward these goals.	Communicate current strengths, and use year over year comparisons to measure long term progress.	Measure success in terms of meeting industry standard best practices.
3	**Build a PMO Improvement Roadmap**	Cut through the noise: uncover the processes that really matter in building your world-class PMO function.	Align your team behind achieving your vision, communicating the rationale behind your decisions.	Prioritize quick wins to show your stakeholders that rapid improvement is a priority.

Project Portfolio Management

Current State Scorecard

PREPARED FOR:

David Duffy
Info-Tech Research Group

Fill out by yourself or with your team.

PPM

DIAGNOSTIC PROGRAM
POWERED BY INFO-TECH RESEARCH GROUP

Project Portfolio Management
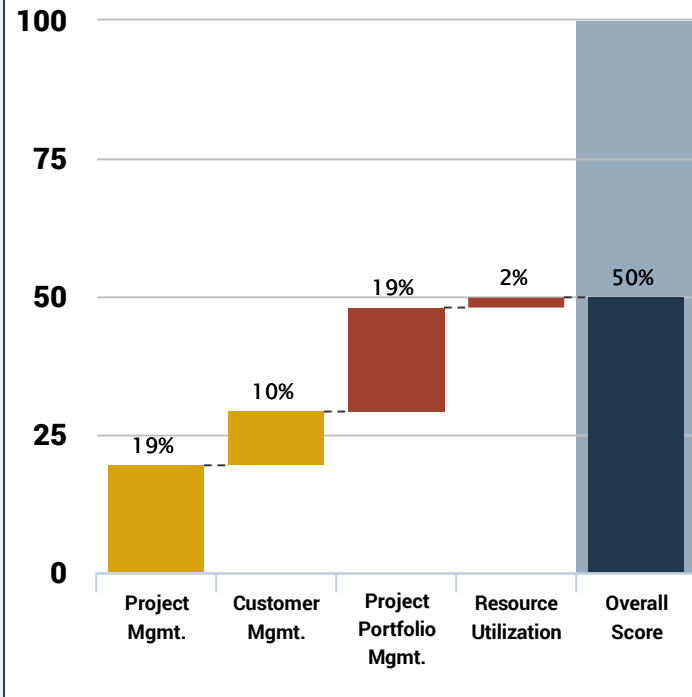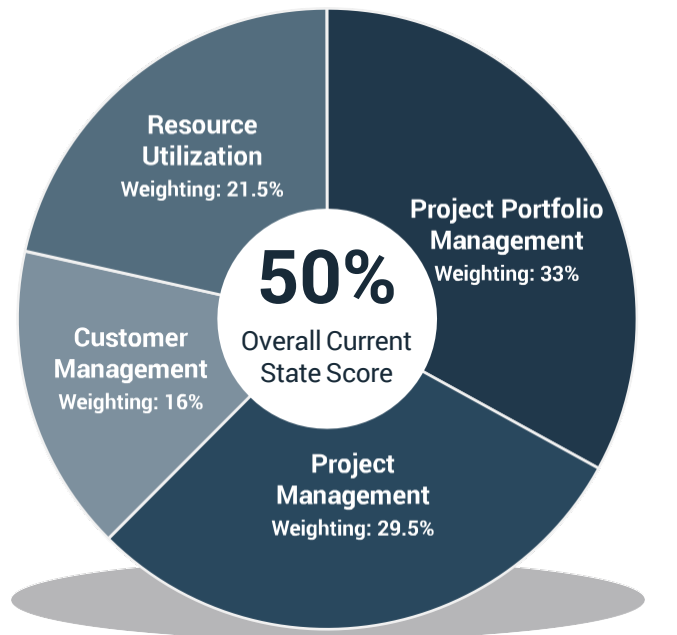## Current State Scorecard

Use the information in this report to understand your Project Portfolio Management environment and identify areas for improve...
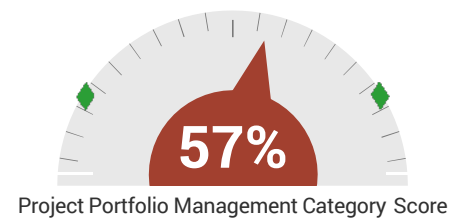Scores in this report are based on the knowledge and perceptions of the Portfolio Owner, and are calculated using Info-Tech's weighting scale. Weightings in ea...
calculations, see the "Scoring Methodology" section of this report.

Evaluate PMO performance across 4 areas and 24 sub-areas. Determine which areas require improvement and use this report to help you get there.

OVERALL CURRENT STATE SCORE

50% Overall Current State Score

- Resource Utilization — Weighting: 21.5%
- Project Portfolio Management — Weighting: 33%
- Customer Management — Weighting: 16%
- Project Management — Weighting: 29.5%

Bar chart values:
- Project Mgmt.: 19%
- Customer Mgmt.: 10%
- Project Portfolio Mgmt.: 19%
- Resource Utilization: 2%
- Overall Score: 50%

PROJECT PORTFOLIO MANAGEMENT

57% Project Portfolio Management Category Score

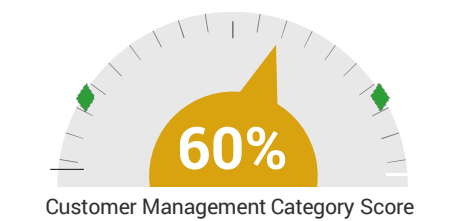| Subcategory	Score
Project Portfolio Report Completeness — Subcategory Weighting: 8%	3.3/6
Capacity Awareness — Subcategory Weighting: 16%	2.8/6
Strategic Alignment — Subcategory Weighting: 15%	4.3/6
Backlog — Subcategory Weighting: 11%	3.3/6
Project Portfolio Report Currency — Subcategory Weighting: 19%	3.4/6
Resourcing — Subcategory Weighting: 11%	3/6
Alignment with Operational Goals — Subcategory Weighting: 11%	4.1/6
Capacity Quality — Subcategory Weighting: 9%	3.3/6

PROJECT MANAGEMENT

65% Project Management Category Score
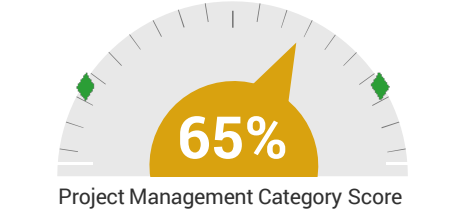
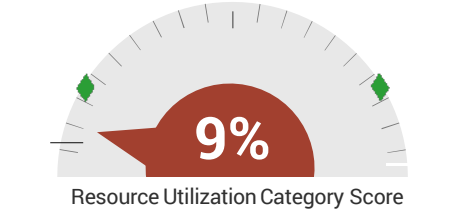| Subcategory	Score
Quality — Subcategory Weighting: 20%	4.1/6
Productivity — Subcategory Weighting: 10%	3.6/6
Projects Delivered on Time — Subcategory Weighting: 17%	4.2/6
Projects Delivered in Scope — Subcategory Weighting: 19%	4.4/6
Communication — Subcategory Weighting: 13.5%	3.2/6
Agility — Subcategory Weighting: 7%	3.6/6
Projects Delivered on Budget — Subcategory Weighting: 13.5%	3.8/6

CUSTOMER MANAGEMENT

60% Customer Management Category Score

Subcategory	Score
Clarity of Business Goals — Subcategory Weighting: 25%	3.8/6
Involvement in Testing — Subcategory Weighting: 31%	3.3/6
Analysis of Requirements — Subcategory Weighting: 19%	3.5/6
Leadership in Change Communication — Subcategory Weighting: 25%	3.8/6

RESOURCE UTILIZATION

9% Resource Utilization Category Score

| Subcategory	Waste
Cancelled Projects — Subcategory Weighting: 28%	9%
Suboptimal Assignment of Resources — Subcategory Weighting: 9%	8%
Analyzing, Fixing, Re-Deploying — Subcategory Weighting: 23%	15%
Inefficiency — Subcategory Weighting: 14%	16%
Unassigned Resources — Subcategory Weighting: 26%	6%

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This page compares your current scores with those of previous periods

See how your performance is changing over time. Use this to communicate success to your team or stakeholders.

OVERALL CURRENT STATE SCORE

| | June 2015 | June 2015 | May 2016 | P4 | P5 |
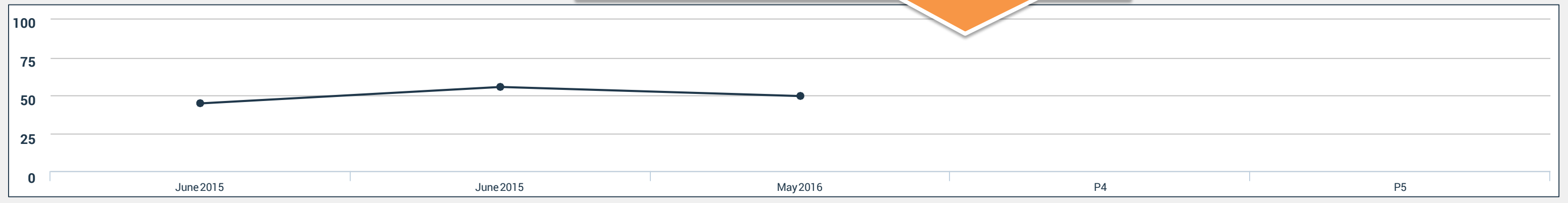
PROJECT PORTFOLIO MANAGEMENT
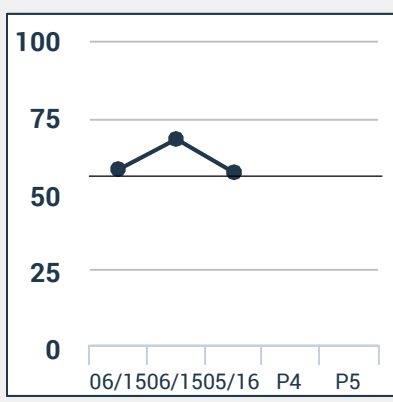
	06/15	06/15	05/16	P4	P5
Report Completeness	3.8/6	4.0/6	3.3/6		
Report Currency	4.1/6	4.0/6	3.4/6		
Capacity Awareness	3.0/6	4.8/6	2.8/6		
Resourcing	3.5/6	4.3/6	3.0/6		
Strategic Alignment	3.4/6	4.0/6	4.3/6		
Alignment with Operational Goals	2.8/6	3.8/6	4.1/6		
Backlog	3.6/6	3.8/6	3.3/6		
Capacity Quality	3.8/6	4.0/6	3.3/6		

PROJECT MANAGEMENT
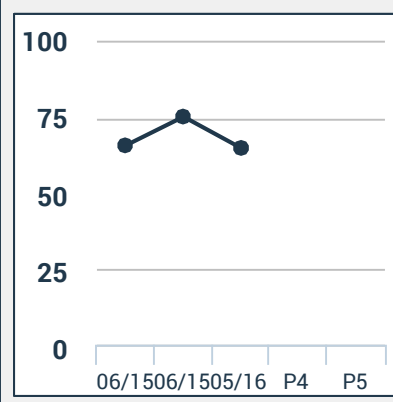
	06/15	06/15	05/16	P4	P5
Quality	3.8/6	4.5/6	4.1/6		
Communication	3.5/6	4.5/6	3.2/6		
Productivity	4.0/6	4.8/6	3.6/6		
Agility	3.8/6	4.8/6	3.6/6		
Projects Delivered on Time	4.1/6	5.0/6	4.2/6		
Projects Delivered on Budget	4.3/6	4.5/6	3.8/6		
Projects Delivered in Scope	4.3/6	4.0/6	4.4/6		

CUSTOMER MANAGEMENT
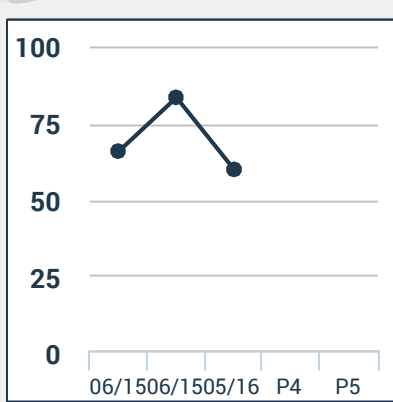
	06/15	06/15	05/16	P4	P5
Clarity of Business Goals	3.6/6	5.0/6	3.8/6		
Analysis of Requirements	4.1/6	4.8/6	3.5/6		
Involvement in Testing	4.1/6	5.3/6	3.3/6		
Leadership in Change Communication	4.0/6	5.0/6	3.8/6		

RESOURCE UTILIZATION
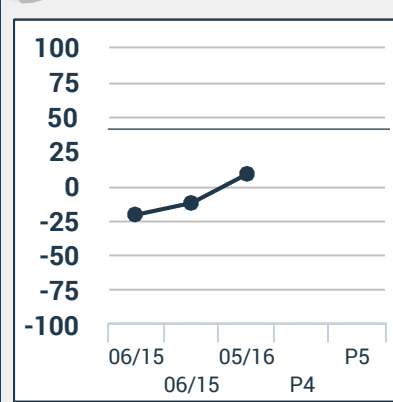
	06/15	06/15	05/16	P4	P5
Cancelled Projects	20.4%	21.3%	9.4%		
Inefficiency	12.6%	10.0%	15.9%		
Suboptimal Assignment of Resources	13.5%	16.3%	7.7%		
Unassigned Resources	13.6%	12.8%	5.6%		
Analyzing, Fixing, Re-Deploying	10.4%	6.8%	15.4%		

REPORT OVERVIEW

Scores

03 Recommended Actions Roadmap

04 Project Portfolio Management

05 Project Management

06 Resource Utilization & Customer Mgmt.

07 Scoring Methodology

6

Get a prioritized list of PMO areas requiring immediate attention.
Use this to focus work effort and build improvements.

This section consolidates and prioritizes the recommended action ite[...]es that are currently solid, and maintain the effective practices you currently have in place.

Resource Utilization
Analyzing, Fixing, Re-Deploying

! HIGH — Waste: 15%

Action
Make sure that quality and completeness are more important than pushing projects through to completion if they aren't truly done. Proper pacing of the project may result in missing a target date, but will ultimately avoid waste by reducing costly defects and unplanned phase two clean-up projects.

Resource Utilization
Cancelled Projects

! HIGH — Waste: 9%

Action
Formalize and streamline the new project request process in a single "channel" such as an intranet request form. Reduce cancelled project waste by ensuring that the wrong projects are not getting started, at-risk projects are cancelled or re-scoped as early as possible, and that you're not approving too many projects.

Project Portfolio Management
Capacity Awareness

! HIGH — Score: 2.8/6

Action
Make the portfolio managers responsible for a current view of the organization's capacity (i.e., maximum potential capacity, current allocation, and current available capacity), along with capacity projections into the near-term future.

Project Portfolio Management
Project Portfolio Report Currency

! HIGH — Score: 3.4/6

Action
If the portfolio data takes too much time to maintain, reduce the scope of the data or increase the resourcing allocated to it. Use the reports for regular portfolio reviews and new funding decisions to reinforce the fact that they need to be maintained.

Customer Management
Involvement in Testing

! HIGH — Score: 3.3/6

Action
Work with the customer throughout the project to develop documented evidence of how to test/validate project completion.

Project Portfolio Management
Resourcing

! HIGH — Score: 3/6

Action
Develop and maintain a database of the people and their applicable skill sets. This information is critical to the ability to forecast capacity into the future.

Project Management
Communication

! HIGH — Score: 3.2/6

Action
Project communication starts with a broad awareness of resourcing. Communicate the gaps between allocated resources and actual time spent on the project. Then focus on project status and project interdependencies.

Project Portfolio Management
Backlog

! HIGH — Score: 3.3/6

Action
Reduce the project backlog to the level that can be delivered in a reasonably short period (no longer than one fiscal year). It's unrealistic for pending projects to retain their scope for long periods, and it should be up to the requestor to maintain that request.

Project Portfolio Management
Capacity Quality
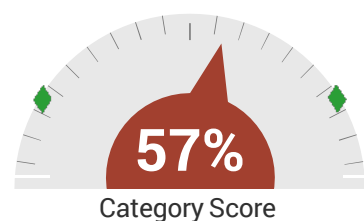
! HIGH — Score: 3.3/6

Action
Review the quality of work estimates and improve the approach through training and project management. Also make sure you're not over-allocating project work: either prioritize the project work above the non-project work, or reduce the project allocation.

Project Portfolio Management
Project Portfolio Report Completeness

! HIGH — Score: 3.3/6

Action
Make sure you've got current lists of active and pending projects, at a minimum. Review these reports with stakeholders to determine what's missing - or what should be removed. Remember that these reports do not have to be the definitive source of all project data; they need to help leaders decide on funding and resourcing priorities.

REPORT OVERVIEW

Scores

03 Recommended Actions Roadmap

04 Project Portfolio Management

05 Project Management

06 Resource Utilization & Customer Mgmt.

07 Scoring Methodology

7

PROJECT PORTFOLIO MANAGEMENT

57%
Category Score

Successful Project Portfolio Management depends on the currency and accuracy of project reporting, effective alignment with organizational goals, and the ability to optimize resourcing, capacity, and throughput.

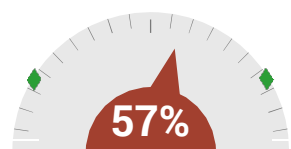| QUESTION, SIGNIFICANCE, AND WEIGHTING	SCORE	CURRENT STATUS	RECOMMENDED ACTION
Project Portfolio Report Completeness - weighting: 8% ❓ How satisfied are you with the completeness of your Project Portfolio Reports? ❗ It's difficult to manage a portfolio if you don't have the right information.	54%	Very Dissatisfied — Very Satisfied	Make sure you've got current lists of active and pending projects, at a minimum. Review these reports with stakeholders to determine what's missing - or what should be removed. Remember that these reports do not have to be the definitive source of all project data; they need to help leaders decide on funding and resourcing priorities.
Project Portfolio Report Currency - weighting: 19% ❓ How satisfied are you that your Project Portfolio Reports have current information? ❗ When executives lose trust in the information's currency, they lose trust in the PMO and the associated costs.	57%	Very Dissatisfied — Very Satisfied	If the portfolio data takes too much time to maintain, reduce the scope of the data or increase the resourcing allocated to it. Use the reports for regular portfolio reviews and new funding decisions to reinforce the fact that they need to be maintained.
Capacity Awareness - weighting: 16% ❓ How satisfied are you with the awareness of resource capacity communicated and demonstrated by the PMO? ❗ Steering committees need to know their limit when approving projects.	46%	Very Dissatisfied — Very Satisfied	Make the portfolio managers responsible for a current view of the organization's capacity (i.e., maximum potential capacity, current allocation, and current available capacity), along with capacity projections into the near-term future.
Resourcing - weighting: 11% ❓ How satisfied are you that project resourcing is optimized with the best skills-assignment matches? ❗ A high-performing portfolio needs to maximize the value of skills.	50%	Very Dissatisfied — Very Satisfied	Develop and maintain a database of the people and their applicable skill sets. This information is critical to the ability to forecast capacity into the future.
Strategic Alignment - weighting: 15% ❓ To what extent is your project portfolio aligned with the company's business strategy? ❗ Avoid a high-quality focus on the wrong projects.	71%	Very Dissatisfied — Very Satisfied	Continue to align the corporate strategy and the project portfolio. Ensure continuity through leadership changes and operational challenges.
Alignment with Operational Goals - weighting: 11% ❓ To what extent is your project portfolio aligned with the company's operational goals? ❗ Align the portfolio with operational metrics to avoid causing new problems as you solve the old ones.	68%	Very Dissatisfied — Very Satisfied	Involve operations-focused business and technology leaders to ensure that the portfolio is more supportive of operational goals.
Backlog - weighting: 11% ❓ There is a minimal list of pending projects. ❗ If the project backlog is too long, the project definitions lose their validity and you end up managing useless information.	56%	Very Dissatisfied — Very Satisfied	Reduce the project backlog to the level that can be delivered in a reasonably short period (no longer than one fiscal year). It's unrealistic for pending projects to retain their scope for long periods, and it should be up to the requestor to maintain that request.
Capacity Quality - weighting: 9%	54%	Very Dissatisfied — Very Satisfied	Review the quality of work estimates and improve the approach through training and project management. Also make sure you're not over-allocating project work: either prioritize the project work above the non-project work, or reduce the project allocation.

Evaluate the effectiveness of individual PMO areas and sub-areas.
For low scoring areas, follow recommended actions to start improvement efforts

REPORT OVERVIEW

Scores

03 Recommended Actions Roadmap

04 Project Portfolio Management

05 Project Management

06 Resource Utilization & Customer Mgmt.
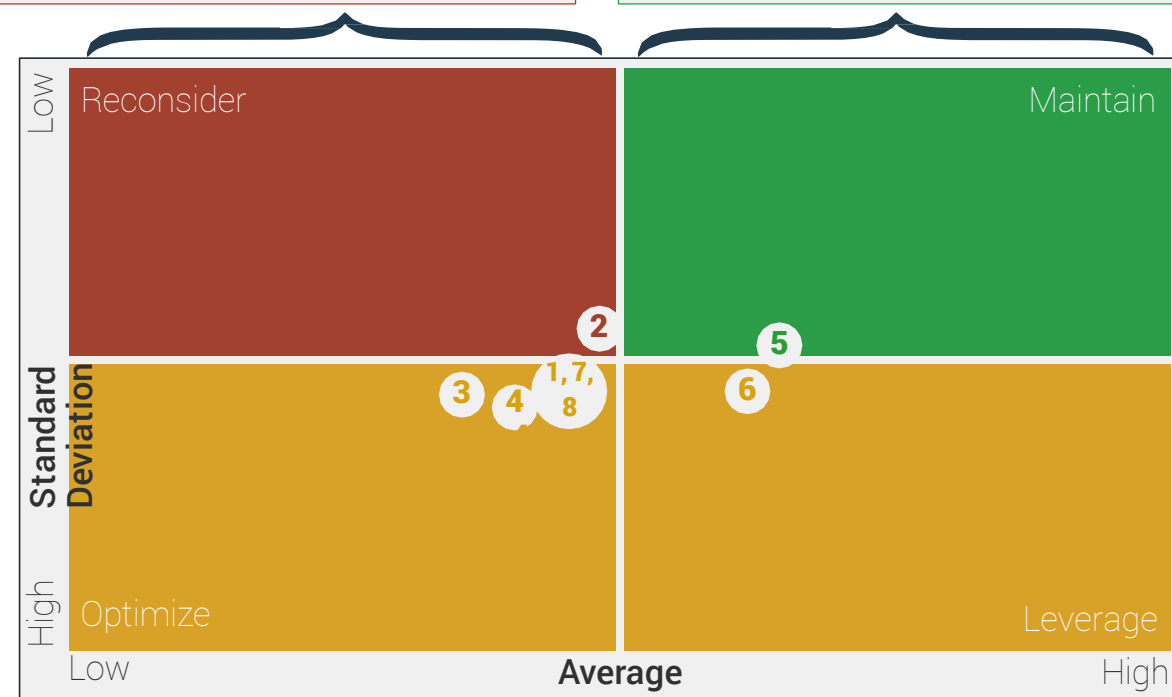
07 Scoring Methodology

8

57%

Overview: Project Portfolio Management functions best when all team members are on the same page. This page shows your team's alignment – their relative opinions and degree of consensus – on the various capabilities, procedures, and practices that determine your Project Portfolio Management effectiveness. Use this information to facilitate knowledge transfer, leverage team member insights, address gaps and discrepancies, and optimize your PPM practices.

Your team is in consensus that this isn't very effective. Follow the recommendations in this report to drive improvement.

Your team agrees that this works well. Maintain this optimal state.

Reconsider | Maintain

Optimize | Leverage

Low — High (Standard Deviation)

Low — High (Average)

Although this has some supporters, most team members don't consider it very effective. Use the recommendations in this report to get the rest of the team onboard.

This is generally seen as effective, but not by everyone. Leverage the insights and benefits identified by the majority to improve the experience of the minority.

Conduct a Team Alignment Exercise
The team alignment exercise is essentially just a conversation between team members about how to standardize approaches, address gaps and discrepancies, and optimize PPM practices.

Keys to success
- **Follow an agenda.** Your team's time is valuable, so it's important to be organized, efficient, and on-task. Keeping to a pre-determined agenda will help make the best use of your time, and will ensure that high priority items get covered first.
- **Designate a moderator.** Someone needs to structure the discussion

Determine whether you and your peers agree on performance.
Conduct a team exercise to build alignment and prioritize issues.

1 PROJECT PORTFOLIO REPORT COMPLETENESS

Top Critics			Top Supporters		
Martin King	2/6		Alan Levin	5/6	
sunil pinnamaneni	2/6		C. Hockenbrough	4/6	
thomas streicher	2/6		Eduardo Lessa	4/6	
John McLaughlin	3/6		Shawn OConnell	4/6	
Bob Klehm	3/6		Bryan Tuthill	4/6	

2 PROJECT PORTFOLIO REPORT CURRENCY

Top Critics			Top Supporters		
Martin King	2/6		Alvaro Jimenez	4/6	
sunil pinnamaneni	2/6		Bob Klehm	4/6	
Sarah Janes	3/6		Eduardo Lessa	4/6	
thomas streicher	3/6		Alan Levin	4/6	
C. Hockenbrough	3/6		John McLaughlin	4/6	

3 CAPACITY AWARENESS

Top Critics			Top Supporters		
C. Hockenbrough	1/6		Martin King	4/6	
Bob Klehm	2/6		Bryan Tuthill	4/6	
Sarah Janes	2/6				
Alan Levin	2/6				
Eduardo Lessa	3/6				

4 RESOURCING

Top Critics			Top Supporters		
Bob Klehm	1/6		Martin King	5/6	
C. Hockenbrough	1/6		Alvaro Jimenez	4/6	
sunil pinnamaneni	2/6		Eduardo Lessa	4/6	
Alan Levin	2/6		John McLaughlin	4/6	
Sarah Janes	3/6		Bryan Tuthill	4/6	

5 STRATEGIC ALIGNMENT

Top Critics			Top Supporters		
Bob Klehm	3/6		C. Hockenbrough	6/6	
sunil pinnamaneni	3/6		Sarah Janes	5/6	
Alvaro Jimenez	3/6		Martin King	4/6	
			Eduardo Lessa	4/6	
			Alan Levin	4/6	

6 ALIGNMENT WITH OPERATIONAL GOALS

Top Critics			Top Supporters		
Bob Klehm	2/6		C. Hockenbrough	6/6	
sunil pinnamaneni	3/6		Sarah Janes	5/6	
Alvaro Jimenez	3/6		Martin King	4/6	
			Eduardo Lessa	4/6	
			Alan Levin	4/6	

7 BACKLOG

Top Critics			Top Supporters		
Bob Klehm	1/6		C. Hockenbrough	5/6	
Eduardo Lessa	2/6		Shawn OConnell	5/6	
John McLaughlin	3/6		Martin King	4/6	
Sarah Janes	3/6		sunil pinnamaneni	4/6	
Alvaro Jimenez	3/6		thomas streicher	4/6	

8 CAPACITY QUALITY

Top Critics			Top Supporters		
John McLaughlin	2/6		Martin King	5/6	
Shawn OConnell	2/6		Sarah Janes	4/6	
Eduardo Lessa	3/6		thomas streicher	4/6	
Bob Klehm	3/6		Bryan Tuthill	4/6	
sunil pinnamaneni	3/6				

REPORT OVERVIEW

Scores | **03** Recommended Actions Roadmap | **04** Project Portfolio Management | **05** Project Management | **06** Resource Utilization & Customer Mgmt. | **07** Scoring Methodology

9

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65%
Category Score
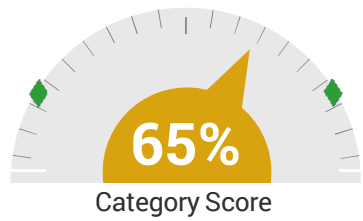
PROJECT MANAGEMENT

Effective project delivery revolves around clear communication, prudent prioritization, and realistic expectations. Ensure that your funding goals are properly aligned with the level of resourcing.
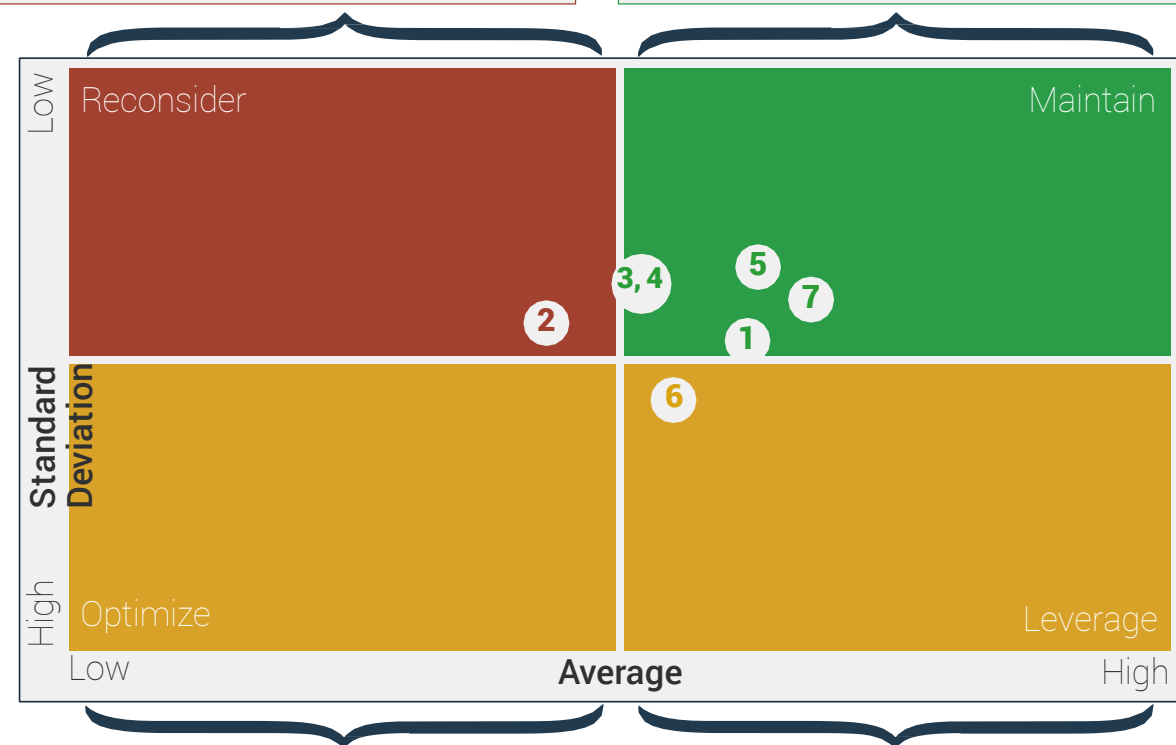
QUESTION, SIGNIFICANCE, AND WEIGHTING	SCORE	CURRENT STATUS	RECOMMENDED ACTION
Quality - weighting: 20% ? Overall, how satisfied are you with the quality of project results? ! Emphasize quality over speed to keep the projects moving forward.	**68%**	Very Dissatisfied — Very Satisfied	Make the portfolio managers accountable for quality, rather than the speed of project completion. Remember that overall throughput decreases when projects have to be reopened because of quality issues or to finish incomplete work.
Communication - weighting: 13.5% ? Overall, how satisfied are you with the quality of project communications? ! Communication is fundamentally about aligning resources with requirements.	**53%**	Very Dissatisfied — Very Satisfied	Project communication starts with a broad awareness of resourcing. Communicate the gaps between allocated resources and actual time spent on the project. Then focus on project status and project interdependencies.
Productivity - weighting: 10% ? Overall, how satisfied are you with the productivity of your project teams? ! Productivity is not about how much you do, it's about what you get done.	**60%**	Very Dissatisfied — Very Satisfied	Defer non-project interruptions in order to increase the focus on project work. If those interruptions cannot be deferred, they need to be incorporated into the resource allocation.
Agility - weighting: 7% ? Overall, how satisfied are you with the agility of project teams when the scope, resourcing, or timing of projects needs to change? ! Agility requires timely analysis of the changing requirements to maintain quality and effectiveness.	**60%**	Very Dissatisfied — Very Satisfied	Keep a close view of the portfolio prioritization to allow for portfolio agility. Ensure the project sponsor, project manager, and project team are aligned on scope flexibility in order to drive project agility.
Projects Delivered on Time - weighting: 17% ? Our projects are delivered on time. ! Project timeliness depends on making sure you get the resources that were allocated.	**69%**	Very Dissatisfied — Very Satisfied	Improve training and project management to improve the quality of estimates and processes. Use portfolio management best practices (e.g. resource management) to ensure you're not over-allocating the project workers.
Projects Delivered on Budget - weighting: 13.5% ? Our projects are delivered without exceeding the original budget estimate. ! Hold to realistic timelines early in the project to contain the costs.	**63%**	Very Dissatisfied — Very Satisfied	Improve estimation rigor based on the organization's experience with the actual costs at each stage of the project. Encourage re-estimating of costs and timelines if requirements or resourcing change.
Projects Delivered in Scope - weighting: 19% ? Our projects are delivered within the intended scope of results. ! Putting the right processes in place is the key to managing scope in any project management paradigm.	**74%**	Very Dissatisfied — Very Satisfied	Introduce a more rigid and overt process to manage scope changes.

REPORT OVERVIEW

Scores   **03** Recommended Actions Roadmap   **04** Project Portfolio Management   **05** Project Management   **06** Resource Utilization & Customer Mgmt.   **07** Scoring Methodology

10

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65%

Overview: Project Management functions best when all team members are on the same page. This page shows your team's alignment – their relative opinions and degree of consensus – on the various capabilities, procedures, and practices that determine your Project Management effectiveness. Use this information to facilitate knowledge transfer, leverage team member insights, address gaps and discrepancies, and optimize your PPM practices.

Your team is in consensus that this isn't very effective. Follow the recommendations in this report to drive improvement.

Your team agrees that this works well. Maintain this optimal state.

Reconsider (Low)

Maintain

Standard Deviation

Optimize (High)

Leverage

Low — **Average** — High

Although this has some supporters, most team members don't consider it very effective. Use the recommendations in this report to get the rest of the team onboard.

This is generally seen as effective, but not by everyone. Leverage the insights and benefits identified by the majority to improve the experience of the minority.

Conduct a Team Alignment Exercise

The team alignment exercise is essentially just a conversation between team members about how to standardize approaches, address gaps and discrepancies, and optimize PPM practices.

Keys to success
- **Follow an agenda.** Your team's time is valuable, so it's important to be organized, efficient, and on-task. Keeping to a pre-determined agenda will help make the best use of your time, and will ensure that high priority items get covered first.
- **Designate a moderator.** Someone needs to structure the discussion and keep things moving. The moderator should also ensure that everyone is involved and has a chance to contribute; use the individual team member scores and comments as a basis for discussion or as a way of inviting a contribution.
- **Document the discussion.** Be sure to record the key themes and insights of your discussion. Generate a list of next steps and follow up items, and assign timelines and accountability for these immediately.
- **Conduct follow up.** Without follow up, the team alignment exercise is probably a waste of time. Implementing and enforcing the outcomes of your alignment exercise are critical to realizing actual improvement.

1 QUALITY

Top Critics			Top Supporters		
Shawn OConnell	2/6	☐	Sarah Janes	5/6	☐
John McLaughlin	3/6	☐	Martin King	5/6	☐
sunil pinnamaneni	3/6	☐	Bob Klehm	5/6	☐
			C. Hockenbrough	4/6	☐
			Alvaro Jimenez	4/6	☐

2 COMMUNICATION

Top Critics			Top Supporters		
Bryan Tuthill	2/6	☐	Alan Levin	5/6	☐
Eduardo Lessa	3/6	☐	Sarah Janes	4/6	☐
John McLaughlin	3/6	☐			
Martin King	3/6	☐			
Bob Klehm	3/6	☐			

3 PRODUCTIVITY

Top Critics			Top Supporters		
Eduardo Lessa	3/6	☐	Alan Levin	5/6	☐
John McLaughlin	3/6	☐	C. Hockenbrough	4/6	☐
Martin King	3/6	☐	Sarah Janes	4/6	☐
Shawn OConnell	3/6	☐	Bob Klehm	4/6	☐
sunil pinnamaneni	3/6	☐	thomas streicher	4/6	☐

4 AGILITY

Top Critics			Top Supporters		
John McLaughlin	2/6	☐	C. Hockenbrough	4/6	☐
Eduardo Lessa	3/6	☐	Sarah Janes	4/6	☐
sunil pinnamaneni	3/6	☐	Alvaro Jimenez	4/6	☐
thomas streicher	3/6	☐	Martin King	4/6	☐
			Bob Klehm	4/6	☐

5 PROJECTS DELIVERED ON TIME

Top Critics			Top Supporters		
Sarah Janes	3/6	☐	C. Hockenbrough	5/6	☐
Shawn OConnell	3/6	☐	Martin King	5/6	☐
			Alvaro Jimenez	4/6	☐
			Bob Klehm	4/6	☐
			Eduardo Lessa	4/6	☐

6 PROJECTS DELIVERED ON BUDGET

Top Critics			Top Supporters		
Shawn OConnell	2/6	☐	C. Hockenbrough	6/6	☐
Eduardo Lessa	3/6	☐	Martin King	5/6	☐
John McLaughlin	3/6	☐	Alan Levin	5/6	☐
Bob Klehm	Don't Know	☐	Sarah Janes	4/6	☐
			Alvaro Jimenez	4/6	☐

7 PROJECTS DELIVERED IN SCOPE

Top Critics			Top Supporters		
John McLaughlin	3/6	☐	C. Hockenbrough	6/6	☐
Shawn OConnell	3/6	☐	Sarah Janes	5/6	☐
			Martin King	5/6	☐
			Alvaro Jimenez	4/6	☐
			Bob Klehm	4/6	☐

REPORT OVERVIEW

Scores

03 Recommended Actions Roadmap

04 Project Portfolio Management

05 Project Management

06 Resource Utilization & Customer Mgmt.

07 Scoring Methodology

11

Resource Utilization and Customer Management
Score Details

Visualize and understand waste being created in the PMO. Follow recommended action to reclaim it, get more done and save money.

RESOURCE UTILIZATION

9%
Category Score
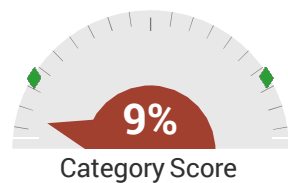
Optimize your Project Portfolio Management practices by recognizing and reducing waste. Use the information in this section to identify areas of significant waste and to understand your next steps in addressing them.

QUESTION: "Approximately what percentage of your overall project portfolio costs are consumed by the following?"

Potential PPM Resource Waste: 54%

- 6%
- 15%
- 8%
- 16%
- 9%
- 46%
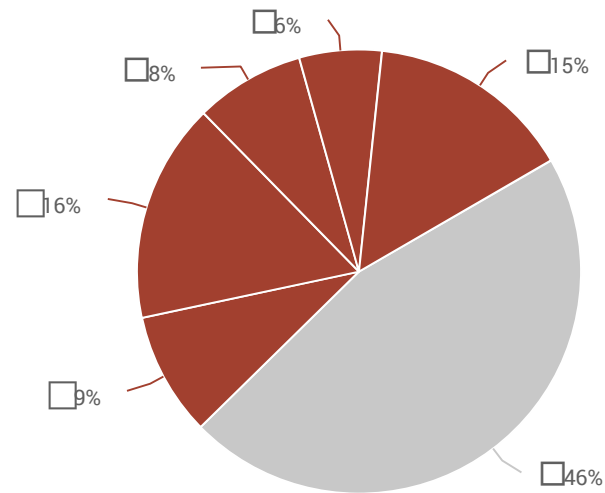
□ Productive Project Work

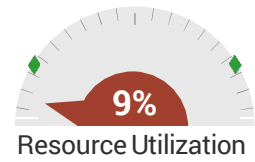| QUESTION, SIGNIFICANCE, AND WEIGHTING	AMOUNT OF WASTE	RECOMMENDED ACTION
CANCELLED PROJECTS - WEIGHTING: 28% Cancelled project costs are the purest form of resource waste.	**9%** — 9% (100% – 0%)	Formalize and streamline the new project request process in a single "channel" such as an intranet request form. Reduce cancelled project waste by ensuring that the wrong projects are not getting started, at-risk projects are cancelled or re-scoped as early as possible, and that you're not approving too many projects.
INEFFICIENCY - WEIGHTING: 14% Interruptions are the most obvious driver of inefficiency.	**16%** — 16% (100% – 0%)	Reduce interruptions to the project team that result from the reactive support business and ad-hoc work. Don't ignore the non-strategic project work: manage what doesn't get worked on by eliminating, deferring, or reducing the resourcing for the interruptions.
SUBOPTIMAL ASSIGNMENT OF RESOURCES - WEIGHTING: 9% Optimal resource assignments drive better efficiencies.	**8%** — 8% (100% – 0%)	Make the portfolio managers accountable for optimizing the number of projects being concurrently executed to get the best-fit resources on the work.
UNASSIGNED RESOURCES - WEIGHTING: 26% When people aren't deliberately assigned project work, it is less likely that the time will produce strategically or operationally significant results.	**6%** — 6% (100% – 0%)	Make sure your projects have a well-documented backlog of tasks that can fill those gaps without management intervention.
ANALYZING, FIXING, RE-DEPLOYING - WEIGHTING: 23% Cleaning up from past projects takes resources away from the new projects.	**15%** — 15% (100% – 0%)	Make sure that quality and completeness are more important than pushing projects through to completion if they aren't truly done. Proper pacing of the project may result in missing a target date, but will ultimately avoid waste by reducing costly defects and unplanned phase two clean-up projects.

CUSTOMER MANAGEMENT

60%
Category Score
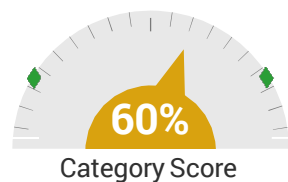
As more organizations move toward Agile methodologies, customers are becoming increasingly involved throughout the project cycle. Clarifying customer roles, requirements, and expectations is important for project success.

QUESTION: "How satisfied are you that you're managing the project customers to fulfill their role in the following areas?"

Very Satisfied ... Very Dissatisfied

CLARITY OF BUSINESS GOALS- WEIGHTING: 25%
Project quality suffers when the busines goals are unclear or unstable.
64%
RECOMMENDED ACTION:
Use a Project Charter and ensure it gets maintained throughout the project.

ANALYSIS OF REQUIREMENTS- WEIGHTING: 19%
The project customer needs to be aware of the broader impact of their requirements to ensure their improvemenet doesn't cause another area to suffer.
58%
RECOMMENDED ACTION:
Get the PMs and BAs to use the Project Charter with the customer when defining requirements, before the project team consumes financial or human resources. Ensure that requirements are continually reflected back to the customer in the form of cost, timeline, and alignment analysis.

INVOLVEMENT IN TESTING- WEIGHTING: 31%
Customer validation needs to ensure quality before changes are made.
56%
RECOMMENDED ACTION:
Work with the customer throughout the project to develop documented evidence of how to test/ validate project completion.

LEADERSHIP IN CHANGE COMMUNICATION- WEIGHTING: 25%
Communications are more effective coming from the area that sponsored the project.
63%
RECOMMENDED ACTION:
Ensure that the project managers are driving the change communication process, but that the message comes from the customer. The customer needs to be the voice of project-related change.

REPORT OVERVIEW

Scores
03 Recommended Actions Roadmap
04 Project Portfolio Management
05 Project Management
06 Resource Utilization & Customer Mgmt.
07 Scoring Methodology

12

Resource Utilization and Customer Management

Team Alignment

powered by
INFO~TECH
RESEARCH GROUP
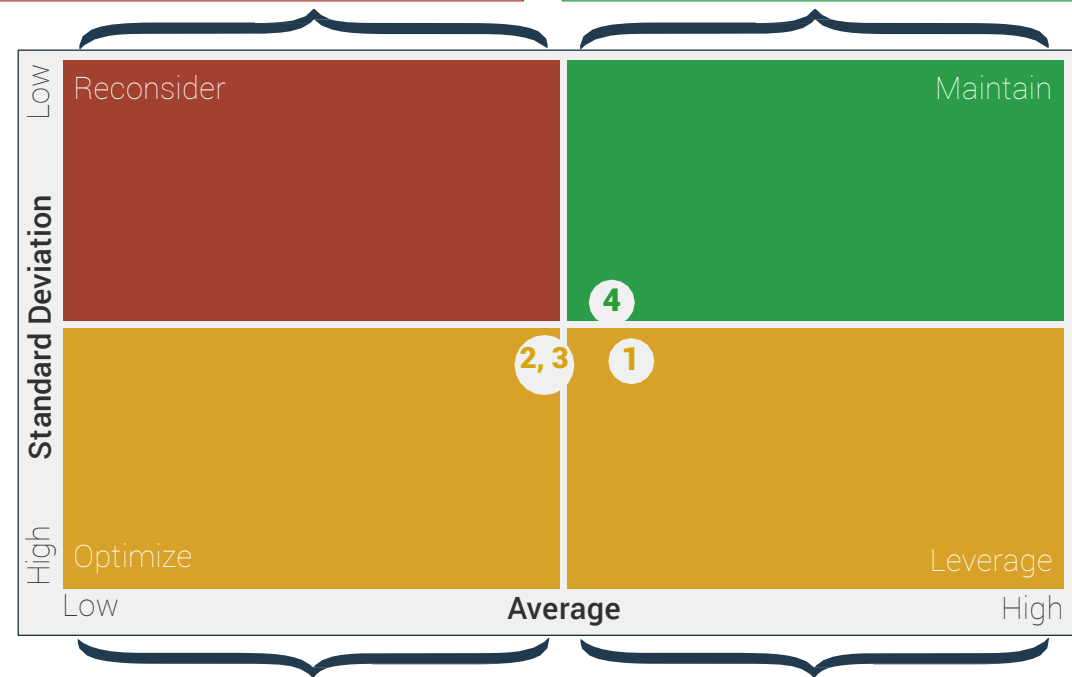
60% Customer Management

9% Resource Utilization

Overview: Project Portfolio Management functions best when all team members are on the same page. This page shows your team's alignment – their relative opinions and degree of consensus – on the various capabilities, procedures, and practices that determine your Customer Management and Resource Utilization effectiveness. Use this information to facilitate knowledge transfer, leverage team member insights, address gaps and discrepancies, and optimize your PPM practices.

CUSTOMER MANAGEMENT

Your team is in consensus that this isn't very effective. Follow the recommendations in this report to drive improvement.

Your team agrees that this works well. Maintain this optimal state.

Standard Deviation: Low / High

Reconsider | Maintain

④

2, 3 | ①

Optimize | Leverage

Average: Low / High

Although this has some supporters, most team members don't consider it very effective. Use the recommendations in this report to get the rest of the team onboard.

This is generally seen as effective, but not by everyone. Leverage the insights and benefits identified by the majority to improve the experience of the minority.

1 CLARITY OF BUSINESS GOALS

Top Critics		Top Supporters	
C. Hockenbrough	2/6	Alan Levin	6/6
John McLaughlin	3/6	Alvaro Jimenez	5/6
Sarah Janes	3/6	Martin King	5/6
Shawn OConnell	3/6	Bob Klehm	4/6
sunil pinnamaneni	3/6	Eduardo Lessa	4/6

2 ANALYSIS OF REQUIREMENTS

Top Critics		Top Supporters	
Sarah Janes	1/6	Alan Levin	6/6
C. Hockenbrough	2/6	Alvaro Jimenez	5/6
John McLaughlin	3/6	Martin King	4/6
Shawn OConnell	3/6	Bob Klehm	4/6
sunil pinnamaneni	3/6	Eduardo Lessa	4/6

3 INVOLVEMENT IN TESTING

Top Critics		Top Supporters	
John McLaughlin	2/6	Alvaro Jimenez	5/6
Shawn OConnell	2/6	Martin King	4/6
C. Hockenbrough	2/6	Bob Klehm	4/6
Eduardo Lessa	3/6	Alan Levin	4/6
Sarah Janes	3/6	thomas streicher	4/6

4 LEADERSHIP IN CHANGE COMMUNICATION

Top Critics		Top Supporters	
Eduardo Lessa	3/6	Alvaro Jimenez	5/6
John McLaughlin	3/6	Martin King	5/6
Bob Klehm	3/6	Alan Levin	5/6
Sarah Janes	3/6	Shawn OConnell	4/6
sunil pinnamaneni	3/6	thomas streicher	4/6

RESOURCE UTILIZATION

Team members who estimated the lowest amount of waste

sunil pinnamaneni
6%
3%
5%
14%
72%

Craig Hockenbrough
3%
3%
1%
27%
66%

Alvaro Jimenez
5%
20%
3%
6%
1%
65%
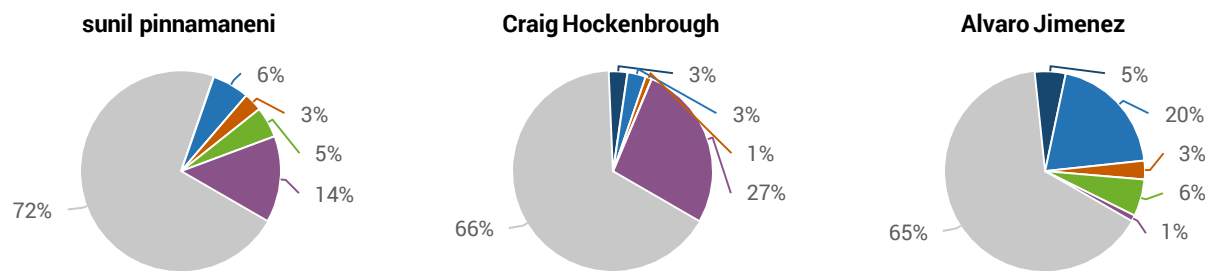
Team members who estimated the largest amount of waste

Sarah Janes
33%
14%
53%

Bryan Tuthill
61%
18%
21%

thomas streicher
21%
10%
4%
40%
5%
20%
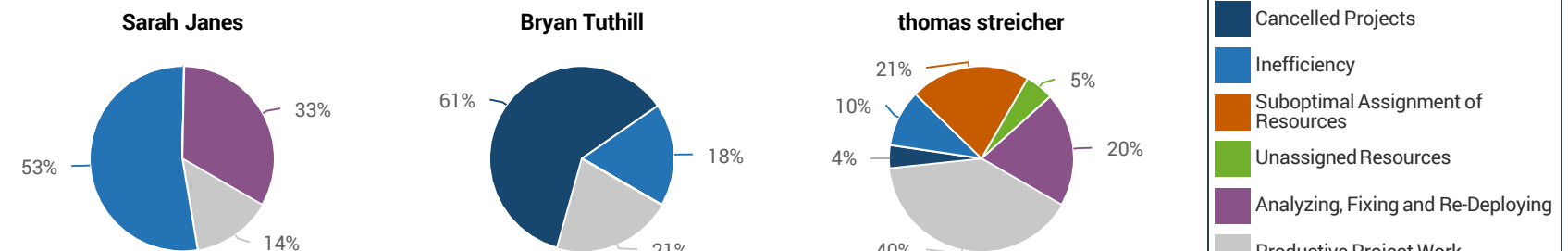
LEGEND
- Cancelled Projects
- Inefficiency
- Suboptimal Assignment of Resources
- Unassigned Resources
- Analyzing, Fixing and Re-Deploying
- Productive Project Work

REPORT OVERVIEW

Scores

03 Recommended Actions Roadmap

04 Project Portfolio Management

05 Project Management

06 Resource Utilization & Customer Mgmt.

07 Scoring Methodology

13